

AAUW Branch & Affiliate Annual Report

Beginning in 2026, each year, branches will complete (mandatory!) the **AAUW Branch & Affiliate Annual Report**, which supports AAUW's annual affiliate reporting process and provides the primary way for branches to document progress toward **5 Star** recognition.

Prior to this year, branches provided 5 Star information through an AAUW branch survey that was voluntary. AAUW is transitioning the former "branch survey" into the AAUW Branch & Affiliate Annual Report to better reflect its role as an official, organization-wide reporting requirement. **This change is driven in part due to new IRS compliance requirements for affiliate-based organizations, which now require AAUW to collect consistent financial and program information from all affiliates participating in the group exemption.**

On April 15, 2026, AAUW presented a webinar entitled
"AAUW Branch & Affiliate Annual Report:
What Leaders Need to Know."



If you missed the webinar, you can view the recording posted on the AAUW 5 Star Program page: https://www.aauw.org/resources/member/5-star-program/

VIEWING THE WEBINAR WILL ANSWER MANY OF YOUR QUESTIONS! Please view the webinar by scrolling past the "FY26 Five-Star Criteria" on the page until you see the webinar recording.

This is your first step before filling out the AAUW Branch & Affiliate Annual Report.



The AAUW Branch & Affiliate Annual Report notice was emailed to branch presidents from Tremayne Parquet on Thursday, April 16, 2026. If you do not have this email, you may access the AAUW Branch & Affiliate Annual Report (and other information) on the 5-Star Program Page here: https://www.aauw.org/resources/member/5-star-program/

The Annual Report Form is now open and will remain available through June 30. Leaders must complete the report by the deadline and use the form to reflect their branch's work across the 5 Star categories.
The person who starts the report must be the person who completes it.

BEFORE YOU FILL OUT THE REPORT, THERE ARE RESOURCES TO HELP!

https://www.aauw.org/resources/member/5-star-program/

(This webpage will be your best friend during this process!)

1. **Read the 5 Star Frequently Asked Questions (FAQs).** You can find these questions on the 5 Star Program page (linked at the top of this page). Scroll down until you see **FAQs**. These questions may help to clarify what is needed on the Branch Annual Report.

2. **WORK ON A DRAFT OF THE REPORT FIRST.** Our best advice is to download, in advance, the Annual Report Questions (PDF format) to use as a draft prior to submission of the official form. The questions are referred to as the "list of questions" on the 5-Star Program page. You can save and revise and complete sections at different times. **Then, transfer your information to the official report when you are ready. (Before the June 30 deadline!)** Here is the direct link to the Annual Report Questions PDF: https://www.aauw.org/app/uploads/2026/04/FY26-Affiliate-Annual-Report-Questions-1.pdf (The online form can be saved if you need to stop and get back to it later.)

3. If you do not have the email from Tremayne Parquet, the official Annual Report Form can be found on the 5 Star Program page (same link as at the top of this document) where it says, "Access the Annual Report." **Whoever starts the report must be the one to complete it.**

4. **For the new financial reporting portion** of the Annual Report, there is a sample balance sheet and income statement (Financial Reporting Template) provided on the 5 Star Program page just below "Access the Annual Report" for leaders to use when completing the report. This balance sheet must be filled out by all branches. It can be uploaded into the official report at the appropriate location. Special instructions are given on the Report Form for branches that have over $50k in revenue for the fiscal year ending June 30, 2025.
   The financial report is for Fiscal Year 25: July 1, 2024 – June 30, 2025

5. **For more information** regarding this organization-wide reporting requirement, read the Talking Points and Messaging for Member Leaders on the 5 Star Program page.
   You may also want to view the recording of the April 15th webinar again.

Still have questions?

Contact Tremayne Parquet, Deputy Director of Advancement, at parquett@aauw.org. (PQ 4/24/26)